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Outlook for U.S. Agricultural Trade

FY 2009 Exports Lowered $3 Billion to $95.5 Billion; Imports Raised $1.5 Billion

Contents

The next release is May 28, 2009

Approved by the World Agricultural Outlook Board.

Fiscal 2009 agricultural exports are forecast at $95.5 billion, down $3 billion from November and $20 billion below record 2008 sales. The outlook for the global economy has weakened further since November, eroding demand for all agricultural products and U.S. grain and feed exports are pressured further by large competitor supplies.

Abundant supplies of wheat and competitively-priced feed substitutes lead to further reductions in grain and feed unit values, and U.S. exports of coarse grains and other feeds are lowered 2.8 million tons and 1.5 million tons, respectively. Cotton export volume is lowered as the outlook for the global economy continues to weaken. Benefiting from near record import demand from China and reduced South American supply, U.S. soybean shipments are increased 3.5 million tons from November and are now forecast slightly above last year’s level, but lower unit value reduces export value. Weak foreign demand lowers the forecast for U.S. exports of animal products, with especially large decreases for pork, dairy products, fats, and hides. Horticultural exports remain unchanged from November’s forecast and $700 million above last year’s sales which, if realized, would be the slowest growth in seven years.

Fiscal 2009 agricultural imports are raised $1.5 billion from November to a record $82.5 billion. Weak consumer spending and contracting domestic demand reduce import growth to the slowest rate in many years. Nevertheless, increases are forecast for vegetable oils, fresh fruit, sugar, and cocoa.

Table 1--U.S. agricultural trade, fiscal years 2004-2009, year ending September 30

Item	2004	2005	2006	2007	2008	Forecast fiscal 2009	
						Nov.	Feb.
				$ billion			
Exports	62.4	62.5	68.6	82.2	115.4	98.5	95.5
Imports	52.7	57.7	64.0	70.1	79.3	81.0	82.5
Balance	9.8	4.8	4.6	12.1	36.1	17.5	13.0

Reflects forecasts in the February 10, 2009, *World Agricultural Supply and Demand Estimates* report.
Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Economic Outlook

Economy drops in 2009, world goes into recession

The U.S. and European recessions are expected to continue into 2009. For the first time in over 40 years, consumer spending is expected to shrink in all major developed countries in 2009 as the world recession has spread to parts of Asia and most of Latin America. World output is expected to shrink in 2009 between 1.5 and 1.8 percent from the direct and indirect effects of the crises in world financial and asset markets and institutions amplified by the burst in equity and housing market bubbles in the developed world. Restrictive credit and high borrower interest rates have brought contraction into sectors that had avoided the last two world recessions. Industrial and farm commodity price declines and lower general inflation in 2009 are all but certain. Real estate, financial market, and commodity prices will continue to deflate in 2009. Brent crude oil averaged $40 per barrel in December 2008, the lowest since July 2004. Crude oil prices, on average, are expected to drop 20-30 percent in 2009 compared with 2008.

U.S. gross domestic product (GDP) is expected to drop 2.2 to 2.8 percent in 2009, down from prior forecasts. The Eurozone grew less than 1 percent in 2008, and is forecast to see GDP shrink 2.5 to 2.8 percent in 2009. This is despite aggressive action by the U.S. Federal Reserve Board and the European Central Bank and extensive fiscal intervention. Developed economies dropping 2.6 to 2.9 percent will cause world economic contraction in 2009, down from 2007. Growth in every major Asian economy will be well below 2008 levels, due to sluggish growth in developed economies and the spread of the financial crisis to Asia that have shrunken overall Asian exports. Latin American will see a drop in output of from 0.5 to 0.8 percent in 2009. Lower commodity prices and oil prices will mitigate the likely drop in nominal government subsidies to the poor for food and fuel in developing economies as government revenues decline.

U.S. GDP shrank in the last half of 2008 due to a sharp decline in housing construction, financial market disturbances outside housing, and troubled bank loan portfolios. Farm operators have continued to get bank loans, despite overall credit rationing, as commercial farm loan delinquencies have been at record low levels. Farm operators may see less credit with higher interest rates as off-farm income drops. Still, farm credit will be less subject to the tight credit rationing seen across the rest of the U.S. economy.

China's GDP is expected to grow 5 to 5.5 percent in 2009, the lowest growth since 1990. The rest of Asia is slated to grow 1.8 percent due in large part to continued growth in India and Indonesia. Slower world growth, tighter world credit conditions, and a shrinking volume of world trade will constrain Asia's trade with the rest of the world. The combination of lower commodity and energy prices, record low transportation costs, and continued fuel and food subsidies will support Intra-Asian trade.

U.S. economic growth will shrink in 2009 due to weak housing construction, higher long-term market interest rates, deteriorating household and business balance sheets, rising unemployment, and falling personal income. This combination of factors is expected to result in a notable drop in consumer spending, especially in the consumer durables category. Shrinking exports and falling imports will do little to moderate the erosion of the U.S. economy in 2009. As the world economy slows further, total world trade growth will fall sharply—further pinching world and domestic growth. Canada's GDP will shrink between 1.5 and 2 percent. Latin American output will decline as Argentina and Brazil shrink 0.5 percent and Mexico drops 2 to 2.5 percent in 2009.

Developed European economies will continue in recession as the continental economy shrinks 2.6 to 3 percent in 2009, with every major European economy in recession. Germany and France are expected to see GDP shrink 3 and 2.5 percent, respectively, with rising unemployment. The United Kingdom is expected to see its GDP drop 2.4 to 2.8 percent.

China's GDP is expected to grow 5 to 5.5 percent in 2009, as exports to the United States and Europe shrink. The large 2-year Chinese government stimulus package will be the major source of expanded domestic spending growth. The rest of Asia is slated to grow about 1.5 percent, as Indian growth slows to 3.5 percent and Korea's economy shrinks 5 percent. Japan is slated to shrink 4.5 to 5 percent. The strong growth in total world trade seen over the last 5 years will reverse as world growth drops and agricultural trade shrinks.

Dollar mixed but up

The yen, yuan, pound, and Euro are expected to strengthen 4, 2, 5, and 7 percent against the dollar in 2009. The dollar is slated to be up 15 percent against the Mexican and Argentine pesos and India rupee, and 10 percent against the Canadian dollar. A 20-percent rise is expected in the Brazilian real to dollar exchange rate.

Downside risk to outlook significant

A deeper U.S. recession, with 2009 GDP dropping 3 percent, could shrink Mexican and Canadian GDP even further. Developed Europe could shrink 4 percent with developing European countries such as Turkey, Ukraine, and Bulgaria shrinking 4 percent. Russia could see GDP growth slowing down to 2 to 3 percent with FSU countries shrinking more sharply.

If China were to slow to 3 percent growth in 2009, accompanied by a drop in other Asia growth to 1 percent, Japan could shrink 7 percent. The bottom line, if several of these events converged, the world economy could drop 3 to 4 percent. World trade would shrink and U.S. farm exports would drop sharply.

Export Products

The fiscal 2009 forecast for grain and feed exports is $26.1 billion, down $2.2 billion from the November forecast and $12.3 billion (nearly a third) lower than last year's sales. This revision is based on lower export volumes and unit values for nearly all commodities. Most of the overall change in export value is based on lower coarse grain sales, which reflects ample global supplies of feedstuffs and uncertain feed demand.

Wheat exports are reduced $300 million from November on lower unit values to $7.4 billion as shipments remain unchanged at 26.5 million tons. Despite a downward revision in Argentina's export supply, other exporters' wheat supplies are ample and more competitive. Coarse grain exports are forecast at $9.2 billion, down $1.7 billion from November, due mostly to lower unit values, but volumes are lowered as well. Coarse grain exports are lowered to 48.8 million tons, down 2.8 million tons since November and 29 percent (19.6 million tons) below last year. Feed and fodder exports are lowered 1.5 million tons to 13.1 million tons.

World import demand for U.S. corn and sorghum is sharply lower, mostly due to economic uncertainty and abundant supplies of competitively priced feed substitutes, both other grains (wheat, barley, and sorghum) and non-grain feed ingredients (distiller's dried grains and cassava). U.S. supplies remain ample due to two consecutive record corn crops and year-to-year declines in feed and export demand. Prices have dropped significantly since last year's record-high levels, and remain under pressure with fierce competition from Brazil, Ukraine, and the EU in markets across North Africa and the Middle East.

Rice exports are lowered $200 million to $1.8 billion on lower unit value and a 300,000-ton reduction to 3.6 million tons. Weaker sales to East Asia, the Middle East, and Sub-Saharan Africa more than offset stronger sales to Oceania and South America. Weaker U.S. long-grain prices more than offset stronger medium-grain prices, which remain at record highs because of Australia's tight crop and Egypt's export ban.

The fiscal 2009 export forecast for oilseeds and products is unchanged from the November estimate at $18.4 billion. Upward revisions in export volumes for soybeans and high-value soy derivatives offset lower exports of other products, both in volume and value.

Soybean exports are increased 3.5 million tons since November due to strong demand from China and reduced supplies from South America, and export volume is now forecast slightly above last year's level. Soybean export value is raised slightly since November to $12.1 billion as higher volume is mostly offset by reduced unit value. With strong soybean exports limiting domestic crush and product availability, soybean meal export volume is reduced, and unit value is raised slightly. Soybean oil exports are lowered, both in volume and value, due to a greater supply of competing vegetable oils.

The forecast for fiscal 2009 cotton exports is lowered $400 million from November's forecast, to $3.6 billion. This reduction is entirely due to lower export volume and reflects a further decrease in expected global import demand. The revised estimate is driven by a 17-percent decrease in the forecast for world trade which is the result of a 5.6-percent decrease in the forecast for world consumption due to deteriorating global economic conditions. The U.S. export forecast is reduced by less than the global import forecast, because India's stock holding policies and delayed government marketing in Central Asia have provided some sales opportunities for U.S. cotton exporters.

Livestock, poultry, and dairy product exports are forecast at $19 billion, down $1.5 billion from November's forecast, and $3.2 billion below last year. Pork, dairy products, animal fats, and cattle hides account for most of the quarterly revision. The major underlying cause of these revisions is weaker demand tied to the global economic crisis, but foreign supply factors also impact U.S. export opportunities for some products.

Pork exports are lowered $600 million (mostly due to a 200,000-ton reduction) bringing the forecast to 1.3 million tons valued at $3.4 billion. The revision is based on a weaker global economy, and a strong dollar. Dairy exports are cut $450 million to $2.7 billion, a sharp reduction from last year's record sales of $4 billion. Global dairy prices are sharply lower due to reduced global demand and greater supplies from Oceania. The EU's recent announcement that export subsidies were reactivated places further pressure on prices.

Animal fats exports are lowered $260 million from the November forecast to $630 million, mostly due to weak demand for fats for use in animal feed and non-food products in many major U.S. markets and lower prices for competing vegetable oils. Cattle hide shipments are forecast $150 million lower as Asian tanners supplying automobile producers face sluggish car sales.

The fiscal 2009 export forecast for horticultural products is unchanged at $21.5 billion, and remains $700 million above last year's sales. Overall, sales volume is mostly flat, but higher prices for some products boost export value. The global economic crisis is expected to slow the growth in horticultural export value to 3 percent, the slowest rate in the past 7 years by a large margin. Weaker exports to major markets such as Canada, Japan, and Korea are largely being offset by stronger exports to Mexico, China, and Taiwan. Horticultural exports to the EU are expected to remain flat.

The export forecast for fresh fruits and vegetables is lowered $300 million from November to $5.7 billion, due partly to lower tomato prices and a smaller orange harvest. Processed fruit and vegetable exports are increased $100 million to $5.7 billion, mainly due to rising dried bean exports. Dominated by almonds, tree nut exports are unchanged from the November forecast of $3.6 billion. A record almond harvest combined with slowing EU demand has put downward pressure on prices and export value. This is offset by surging U.S. pistachio exports (shipped mostly to the EU and China) due to reduced competition from Iran which has suffered a major crop shortfall.

Exports of sugar and tropical products are forecast at $4.0 billion, up $200 million from the November forecast mainly due to strengthening sugar and cocoa prices.

Table 2--U.S. agricultural exports: Value and volume by commodity, 2008-2009

Commodity	October-December		Fiscal year	Forecast fiscal 2009	
	2007	2008	2008	Nov.	Feb.
VALUE			*---Billion dollars--*		
Grains and feeds 1/	8.726	7.166	38.355	28.3	26.1
Wheat 2/	2.891	1.844	12.342	7.7	7.4
Rice	0.398	0.588	2.023	2.0	1.8
Coarse grains 3/	3.547	2.681	15.766	10.9	9.2
Corn	3.020	2.466	14.008	10.0	8.6
Feeds and fodders	1.033	1.125	4.818	4.6	4.2
Oilseeds and products 4/	6.252	7.127	22.858	18.3	18.4
Soybeans	4.476	5.381	14.564	12.0	12.1
Soybean meal 5/	0.692	0.664	3.244	2.6	2.6
Soybean oil	0.309	0.174	1.524	1.0	0.5
Livestock, poultry, and dairy	5.106	5.297	22.170	20.4	19.0
Livestock products	2.997	3.336	13.214	12.9	11.9
Beef and veal 6/	0.531	0.686	2.665	2.7	2.7
Pork 6/	0.819	1.003	3.933	4.0	3.4
Beef and pork variety meats 6/	0.266	0.354	1.271	1.2	1.2
Hides, skins, and furs	0.495	0.428	2.131	2.0	1.9
Poultry and products	1.140	1.270	4.922	4.4	4.3
Broiler meat 6/ 7/	0.781	0.880	3.416	2.9	2.9
Dairy products	0.970	0.691	4.034	3.1	2.7
Tobacco, unmanufactured	0.466	0.424	1.280	1.0	1.2
Cotton	0.876	0.932	4.774	4.0	3.6
Seeds	0.353	0.462	1.206	1.2	1.6
Horticultural products 8/	5.377	5.692	20.795	21.5	21.5
Fruits and vegetables, fresh	1.381	1.450	5.515	6.0	5.7
Fruits and vegetables, processed 8/	1.257	1.430	5.370	5.6	5.7
Tree nuts, whole and processed	1.187	1.184	3.487	3.6	3.6
Sugar and tropical products 9/	0.996	1.034	4.003	3.8	4.0
Major bulk products 10/	12.654	11.850	50.749	37.6	35.3
Total 11/	28.154	28.142	115.450	98.5	95.5
VOLUME			*---Million metric tons--*		
Wheat 2/	8.959	6.072	32.953	26.5	26.5
Rice	0.954	0.854	4.046	3.9	3.6
Coarse grains 3/	19.937	11.440	68.358	51.6	48.8
Corn	17.245	10.439	60.685	47.5	45.0
Feeds and fodders	3.226	3.719	15.381	14.6	13.1
Soybeans	11.214	14.218	30.890	27.8	31.3
Soybean meal 5/	2.154	1.895	8.419	7.8	7.6
Soybean oil	0.328	0.163	1.319	1.0	0.7
Beef and veal 6/	0.123	0.151	0.600	0.6	0.6
Pork 6/	0.322	0.365	1.529	1.5	1.3
Beef and pork variety meats 6/	0.154	0.222	0.724	0.7	0.7
Broiler meat 6/ 7/	0.739	0.796	3.100	2.8	2.8
Tobacco, unmanufactured	0.069	0.054	0.184	0.2	0.2
Cotton	0.591	0.638	2.963	2.8	2.5
Major bulk products 10/	41.724	33.276	139.394	112.8	112.9

Total may not add due to rounding.

1/ Includes corn gluten feed and meal, and processed grain products. 2/ Excludes wheat flour. 3/ Includes corn, barley, sorghum, oats, and rye. 4/ Excludes corn gluten feed and meal. 5/ Includes soy flours made from protein meals. 6/ Includes chilled, frozen, and processed meats. 7/ Includes only federally inspected product. 8/ Includes juices. 9/ Includes coffee and cocoa products, tea, and spices. 10/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco. 11/ Includes cotton linters.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Regional Exports

Global recession and increased competition in grain markets are limiting U.S. export opportunities. The forecast for 2009 agricultural exports falls back to $95.5 billion, following the $115.5-billion record in 2008. Increased competition in global grain markets, much lower prices for grains, oilseeds and cotton, weaker demand and a stronger dollar have reduced U.S. export values across the world. The largest declines from 2008 levels are forecast for East Asia (down $6.6 billion from 2008), with Africa down $2.3 billion, Southeast Asia down $2.2 billion, and South America down $1.9 billion. The NAFTA countries are the top destination for U.S. agricultural exports, followed by East Asia and Europe.

The top five export markets account for 62 percent of all exports at nearly $60 billion. Canada and Mexico remain the top markets with exports of $15.8 and $14.8 billion. Japan remains in third position with $10.5 billion. China's forecast drops to $9.5 billion, keeping it ahead of the EU-27 (forecast at $9.1 billion).

The Western Hemisphere remains the top regional destination for U.S. agricultural exports with $39.7 billion or 42 percent of total sales. Reduced Canadian feed demand due to smaller livestock inventories combined with lower prices for coarse grains and oilseed products lower the forecast for U.S. exports to Canada. The revised forecast is lowered $15.8 billion or $400 million below 2008. Consumer food exports should remain relatively steady, with minimal impact on demand from the weaker Canadian dollar and the recession. Sales of high-value products to Mexico, on the other hand, are more vulnerable to the recession and currency adjustments. This, and the fact that bulk commodities (whose prices are lower) make up a larger portion of U.S. exports to Mexico, means that U.S. exports to Mexico should decline at a faster rate than sales to Canada. The forecast for exports to Mexico is lowered to $14.8 billion. Export declines are forecast for most of our South American partners.

The forecast for exports to Asia is lowered $2.8 billion to $34.4 billion. This is mostly due to reduced expectations for U.S. grain exports (both volume and value) to the region, but also lower soybean and product prices and reduced cotton sales. The forecast for China receives the largest downward adjustment, reduced $900 million to $9.5 billion. Soybean shipments to all destinations were increased this quarter (to a figure actually slightly higher than last year), due to very strong China demand and reduced South American competition. But soybean sales values will slip on lower prices. In addition to lower soybean export value, the total sales figure is down this year as cotton sales decline. Exports forecasts to Japan, South Korea and all other secondary Asian markets are lowered.

U.S. agricultural exports to Europe, Africa, and the Middle East are forecast to decline in 2009, mainly due to falling U.S. grain exports (both value and volume) and lower bulk commodity prices. U.S. exports to the EU are raised from November's estimate, but are still $1.6 billion below 2008. Most of this decline is due to the loss of grain markets this year and lower soybean prices. Consumer food and beverage retail sales across most of Europe, as in the United States, are expected to hold relatively steady during the recession.

Table 3--U.S. agricultural exports: Value by region, 2008-2009

Country and region 1/	October-December		Fiscal year	Forecast fiscal year 2009		Share of 2008 total
	2007	2008	2008	Nov.	Feb.	
	---Billion dollars--					*Percent*
Asia	10.246	11.226	43.374	37.2	34.4	39.9
East Asia	8.301	9.449	35.045	31.0	28.4	33.6
Japan	2.723	2.886	13.103	11.5	10.5	10.3
China	3.244	4.175	11.233	10.4	9.5	14.8
Hong Kong	0.397	0.514	1.597	1.5	1.6	1.8
Taiwan	0.905	0.816	3.509	3.1	2.8	2.9
South Korea	1.030	1.039	5.559	4.5	4.0	3.7
Southeast Asia	1.620	1.511	7.148	5.1	4.9	5.4
Indonesia	0.458	0.447	2.240	1.9	1.5	1.6
Philippines	0.379	0.383	1.730	1.4	1.1	1.4
Malaysia	0.154	0.130	0.631	0.6	0.4	0.5
Thailand	0.310	0.229	1.144	1.1	0.8	0.8
South Asia	0.325	0.267	1.182	1.1	1.1	0.9
Western Hemisphere	9.955	10.454	43.802	39.2	39.7	37.1
North America	7.363	7.799	31.832	30.4	30.6	27.7
Canada	3.909	3.904	16.245	16.4	15.8	13.9
Mexico	3.454	3.894	15.587	14.0	14.8	13.8
Caribbean	0.791	0.871	3.519	2.6	3.0	3.1
Central America	0.728	0.771	3.057	2.5	2.6	2.7
South America	1.072	1.014	5.394	3.7	3.5	3.6
Brazil	0.093	0.107	0.663	0.5	0.5	0.4
Colombia	0.376	0.293	1.759	1.3	1.0	1.0
Venezuela	0.181	0.328	1.451	1.2	1.1	1.2
Europe/Eurasia	3.962	3.391	13.513	10.6	11.2	12.1
European Union-27 2/	3.276	2.703	10.668	8.4	9.1	9.6
Other Europe 3/	0.159	0.181	0.521	0.4	0.4	0.6
FSU-12 4/	0.527	0.507	2.323	1.8	1.7	1.8
Russia	0.434	0.394	1.878	1.3	1.2	1.4
Middle East	1.760	1.499	6.918	4.8	4.8	5.3
Turkey	0.398	0.362	1.739	1.5	1.5	1.3
Saudi Arabia	0.273	0.185	0.979	0.8	0.8	0.7
Africa	1.685	1.132	6.363	5.4	4.1	4.0
North Africa	1.082	0.406	3.841	3.3	2.2	1.4
Egypt	0.425	0.277	2.199	1.9	1.9	1.0
Sub-Saharan Africa	0.603	0.726	2.523	1.8	1.8	2.6
Oceania	0.055	0.106	1.143	1.0	1.1	0.4
Transshipments via Canada 5/	0.285	0.332	0.336	0.3	0.3	1.2
Total	28.154	28.142	115.450	98.5	95.5	100.0

Total may not add due to rounding.

1/ Projections are based primarily on trend or recent average growth analysis.

2/ The former EU-25 plus Romania and Bulgaria who acceded in January 2007.

3/ Major countries include Switzerland, Norway, Iceland, and former Yugoslav states.

4/ The former 15 Republics of the Soviet Union minus the three Baltic Republics.

5/ Transshipments through Canada have not been allocated to final destination, but are included in the total.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Import Products

Despite the downturn in the U.S. economy, agricultural imports continued to rise in the first quarter of fiscal year 2009. The 6-percent quarterly gain, however, is expected to slow to 4 percent over the year. The projected total import value is $82.5 billion, up $1.5 billion from last year's forecast and $3.2 billion more than in 2008. While the overall import bill is higher, import values for component commodity groups have mixed growth rates. In contrast to the average 12-percent growth in U.S. import value from 2003 to 2008, the pace in 2009 will be about a third as large. While U.S. import price inflation in 2008 was 7 percent, prices in 2009 are expected to decline, not only because of the U.S. recession, but also because global import demand is much weaker.

While import forecasts for livestock and horticultural products are both lower, forecasts for sugar and tropical products, grains and grain products, and vegetable oils and oilseeds are all higher. The forecast gains more than offset the losses by $1.5 billion. Although the first quarter's total import volume is up 5 percent, the average growth over the fiscal year is expected at 4 percent. Even though import prices thus far are 1 percent higher on average than last year, the current short-term direction is downward.

Imported livestock products are expected to amount to $11.3 billion in 2009, down $700 million from the last forecast and close to $900 million less than in 2008. The bulk of this downward change is due to much smaller shipments of live cattle from Canada. Beef imports are forecast higher as low U.S. cow slaughter increases demand for beef. The value of dairy product imports is reduced as domestic producer prices have fallen.

The trimmed forecast for horticultural crops and products is attributed to declines in processed fruit, including fruit juices, tree nuts, wine, essential oils, cut flowers, and nursery stock. The $200 million adjustment downward of fruit juices is due to much lower volume of shipments of orange juice from Brazil and apple juice from China in fiscal 2009's first quarter. Grape and apple juice shipments from Argentina are also lower thus far. Many high-valued horticultural products such as fruit juices, tree nuts, beer, and essential oils are suffering from negative income effects as their import volumes fall. With respect to fresh fruits, import demand has thus far shifted from citrus fruits and melons to other fresh fruits such as avocados, cranberries, grapes, papayas, and oranges. In addition, import quantities of cashews and other tree nuts are down. Grape wines from France and Italy are also feeling the pinch from the U.S. income downturn.

The import forecast for grains and grain products is raised by $500 million to account for the larger than expected imports of wheat and milled grain products. Wheat imports in the first quarter increased by almost 50 percent in volume, as shipments from Canada surged after the harvest season. Canada's 43-percent larger wheat crop in 2008 is behind the export surge south of the border. The lower price of imported wheat is in part feeding the U.S. demand despite the bigger domestic wheat crop. With respect to other grains, such as rice, barley, and oats, the larger U.S. crops are expected to constrict their imports.

Lower prices of vegetable oils such as palm and olive oil are boosting imports. Canola oil imports are up 32 percent in volume as canola prices have declined as well. Overall, imported vegetable oils are projected at $5.5 billion in 2009, up $900 million from 2008. The price drops for tropical oils and canola oil have been deeper than for soybean oil, which explains their strong demand relative to the latter despite the 11-percent larger U.S soybean crop. Moreover, palm oil and canola oil continue to replace soybean oil in the effort by food manufacturers to substitute unsaturated fats for transfats and saturated fats.

Another $500 million in imports is anticipated from sugar and tropical products. Again, lower prices for sugar, cocoa, coffee, and rubber are partly driving their import demand. Import values in the first quarter for sugar, cocoa, and rubber were particularly strong, which boost their forecasts by a collective $800 million for 2009. However, the moribund U.S. automobile industry dictates a more subdued forecast for imported rubber. Although the $4.5 billion coffee import forecast is lowered $300 million, it is still $1.5 billion larger than in 2008. This attests to the resilience of comfort foods such as cocoa, coffee, and tea during economic downcycles. The short-term outlook for the dollar is upward, which implies that import demand will benefit from greater purchasing power to counter part of the adverse income effect.

Table 4--U.S. agricultural imports: Value and volume by commodity, fiscal years 2008-2009

Commodity	October -December		Fiscal year	Forecast fiscal year 2009	
	2007	2008	2008	Nov.	Feb.
VALUE			*--- Billion dollars ---*		
Livestock, dairy, & poultry	3.362	3.170	12.174	12.0	11.3
Livestock and meats	2.400	2.172	8.703	8.4	8.0
Cattle and calves	0.675	0.441	2.022	1.5	1.4
Swine	0.166	0.105	0.544	0.5	0.4
Beef and veal	0.704	0.799	2.965	3.0	3.1
Pork	0.289	0.278	1.099	1.1	1.0
Dairy products	0.848	0.888	3.008	3.0	2.9
Cheese	0.353	0.348	1.172	1.1	1.1
Grains and feed	1.762	1.984	7.885	8.0	8.5
Grain products	1.145	1.246	4.603	4.6	4.8
Oilseeds and products	1.316	1.661	6.581	5.7	7.8
Vegetable oils	0.932	1.198	4.594	4.0	5.5
Horticulture products	8.257	8.442	34.712	36.1	35.3
Fruits, fresh	1.166	1.304	5.544	5.6	6.1
Fruits, processed	0.887	0.886	3.984	4.4	3.9
Fruit juices	0.426	0.394	1.935	2.0	1.8
Nuts, whole and processed	0.336	0.324	1.277	1.4	1.2
Vegetables, fresh	1.020	1.038	4.442	4.5	4.5
Vegetables, processed	0.852	0.912	3.520	3.7	3.7
Wine	1.352	1.251	4.755	4.8	4.4
Malt beer	0.843	0.829	3.662	3.6	3.6
Essential oils	0.627	0.658	2.653	2.8	2.7
Cut flowers & nursery stock	0.379	0.334	1.514	1.5	1.4
Sugar & tropical products	3.706	4.318	16.356	17.4	17.9
Cane and beet sugar	0.228	0.363	0.948	1.0	1.4
Confections 1/	0.318	0.298	1.255	1.4	1.2
Cocoa and chocolate 1/	0.725	0.929	3.046	3.2	3.5
Coffee beans & products	0.926	0.990	4.348	4.8	4.5
Rubber, natural	0.531	0.676	2.711	2.7	2.8
Other imports 2/	0.307	0.284	1.609	1.7	1.5
Total agricultural imports	18.710	19.859	79.317	81.0	82.5
VOLUME			*--- Million metric tons ---*		
Wine 3/	0.234	0.255	0.835	0.8	0.9
Malt beer 3/	0.801	0.757	3.389	3.4	3.2
Fruit juices 3/	1.205	1.002	4.941	5.0	4.1
Cattle and calves 4/	0.892	0.642	2.563	2.0	2.0
Swine 4/	2.869	2.083	10.134	7.4	7.5
Beef and veal	0.203	0.213	0.820	0.8	0.9
Pork	0.098	0.094	0.359	0.4	0.3
Fruits, fresh	1.910	1.935	8.668	8.7	8.8
Fruits, processed 5/	0.340	0.337	1.448	1.5	1.4
Vegetables, fresh	1.109	1.107	4.597	4.7	4.6
Vegetables, processed 5/	0.757	0.754	3.015	3.0	3.0
Vegetable oils	0.791	0.904	3.252	3.3	3.7
Cocoa and chocolate	0.274	0.300	1.075	1.1	1.2
Coffee beans	0.312	0.315	1.350	1.4	1.4
Rubber, natural	0.248	0.236	1.065	1.0	1.0

1/ Confections are consumer-ready products that contain sugar. Cocoa and chocolate are intermediate products.
2/ Largely tobacco and planting seeds. 3/ Liquid volume is in billion liters. 4/ Million head; includes bison. 5/ Excludes juices.
Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Regional Imports

Roughly 88 percent of the U.S. agricultural imports in 2008 was for food products. Of these imported foods and beverages, about 37 percent (in value) are shipped from Canada and Mexico. The rest, ranked by import value, are supplied by the European Union, China, Brazil, Australia, Thailand, and Chile. As a group, the EU-27 actually supplies 21 percent of U.S. food imports, more than the 15 percent from Mexico, but smaller than Canada's 22-percent share. Other major food suppliers to the U.S. are Indonesia, Malaysia, India, New Zealand, Vietnam, and Costa Rica. Horticultural imports from Asia still lag imports from Latin America except Mexico, but are fast gaining in share.

Beverages (except liquors) comprise the largest agricultural import item by the U.S., worth $10.4 billion in 2008, followed closely by fruits at $9.8 billion. (These are exceeded only by fish and shellfish, worth $13.8 billion, which are not part of agricultural imports.) The top suppliers of beverages to the U.S., largely wine and beer, are the EU and Mexico, followed distantly by Australia. Of imported foods, about 57 percent are from crops or plants, 26 percent are from animals, and the remaining 17 percent is for beverages. For animal-derived foods, China, Thailand, and the EU are the top suppliers after Canada. For crop-based foods, the major sources are Canada, the EU, Mexico, and China.

Table 5--U.S. agricultural imports: Value by region, fiscal years 2008-2009

Region and country	October-December		Fiscal year	Share of total	Forecast fiscal year 2009	
	2007	2008	2008	2008	Nov.	Feb.
VALUE	*--- Billion dollars ---*			*Percent*	*--- Billion dollars ---*	
Western Hemisphere	9.533	10.153	41.872	52.8	43.0	43.8
Canada	4.177	4.251	17.935	22.6	18.7	18.1
Mexico	2.423	2.562	10.761	13.6	11.0	11.2
Central America	0.661	0.730	3.541	4.5	3.6	3.8
Costa Rica	0.252	0.256	1.201	1.5	1.2	1.2
Guatemala	0.220	0.274	1.259	1.6	1.3	1.5
Other Central America	0.189	0.200	1.080	1.4	1.1	1.1
Caribbean	0.085	0.103	0.423	0.5	0.4	0.5
South America	2.187	2.507	9.213	11.6	9.4	10.3
Argentina	0.294	0.375	1.177	1.5	1.2	1.4
Brazil	0.730	0.748	2.598	3.3	2.7	2.7
Chile	0.258	0.346	1.961	2.5	1.9	2.4
Colombia	0.395	0.449	1.716	2.2	1.8	1.9
Other South America	0.509	0.589	1.761	2.2	1.8	1.9
Europe and Eurasia	4.440	4.274	16.567	20.9	16.9	15.8
European Union-27 1/	4.290	4.011	15.784	19.9	16.0	14.5
Other Europe	0.125	0.233	0.706	0.9	0.8	1.2
Asia	3.048	3.577	14.168	17.9	14.5	15.8
East Asia	1.017	1.057	4.482	5.7	4.8	4.6
China	0.754	0.780	3.429	4.3	3.7	3.5
Other East Asia	0.263	0.278	1.054	1.3	1.1	1.1
Southeast Asia	1.671	2.078	8.007	10.1	8.0	9.3
Indonesia	0.583	0.730	2.669	3.4	2.7	3.1
Malaysia	0.324	0.481	1.710	2.2	1.6	2.3
Thailand	0.353	0.439	1.831	2.3	1.9	2.1
Other Southeast Asia	0.412	0.429	1.797	2.3	1.8	1.8
South Asia	0.360	0.442	1.678	2.1	1.7	1.9
India	0.330	0.399	1.533	1.9	1.5	1.7
Oceania	1.123	1.229	4.243	5.4	4.2	4.6
Australia	0.704	0.723	2.404	3.0	2.5	2.4
New Zealand	0.385	0.473	1.740	2.2	1.7	1.9
Africa	0.350	0.417	1.659	2.1	1.6	1.7
Sub-Sahara	0.306	0.350	1.402	1.8	1.4	1.4
Ivory Coast	0.128	0.159	0.633	0.8	0.6	0.7
Middle East	0.217	0.208	0.808	1.0	0.8	0.8
Turkey	0.140	0.129	0.490	0.6	0.5	0.5
World total	18.710	19.859	79.317	100.0	81.0	82.5

Totals may not add due to rounding.

1/ The former EU-25 plus Romania and Bulgaria who acceded in January 2007. February forecasts are for EU-25 with Romania and Bulgaria included in Other Europe. The May forecasts are for EU-27.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Reliability Tables

Table 6--Reliability of quarterly U.S. export projections, by commodity and quarter

	Average forecast errors Fiscal 2006-08					Forecast accuracy Fiscal 2006-08					Forecast accuracy
Commodity	Aug [1]	Nov	Feb	May	Aug [2]	Aug [1]	Nov	Feb	May	Aug [2]	
Export value			*Percent*				*"X" if error < 5%*				*Percent*
Grains and feeds	24	16	10	5	3	-	-	-	X	X	40
Wheat	29	22	15	11	7	-	-	-	-	-	0
Rice	8	9	10	8	4	-	-	-	-	X	20
Coarse grains	26	16	12	4	3	-	-	-	X	X	40
Corn	26	16	12	5	3	-	-	-	X	X	40
Feeds and fodders	18	14	9	5	3	-	-	-	X	X	40
Oilseeds and products	21	14	11	8	3	-	-	-	-	X	20
Soybeans	24	13	12	9	4	-	-	-	-	X	20
Soybean meal	30	22	9	9	4	-	-	-	-	X	20
Soybean oil	39	40	17	8	8	-	-	-	-	-	0
Livestock, poultry, and dairy	18	12	10	5	5	-	-	-	X	X	40
Livestock products	18	12	8	6	2	-	-	-	-	X	20
Beef and veal	24	18	10	13	5	-	-	-	-	X	20
Pork	19	12	8	6	3	-	-	-	-	X	20
Beef and pork variety meats	21	17	8	5	3	-	-	-	X	X	40
Hides, skins, and furs	13	10	6	3	2	-	-	-	X	X	40
Poultry and products	18	14	12	6	4	-	-	-	-	X	20
Broiler meat	19	18	12	11	5	-	-	-	-	X	20
Dairy products	27	23	23	14	5	-	-	-	-	X	20
Tobacco, unmanufactured	5	5	3	3	3	X	X	X	X	X	100
Cotton	12	14	9	6	1	-	-	-	-	X	20
Seeds	12	6	0	0	0	-	-	X	X	X	60
Horticultural products	6	6	3	1	0	-	-	X	X	X	60
Fruits and vegetables, fresh	7	6	5	3	1	-	-	X	X	X	60
Fruits & veget., processed	10	10	6	5	2	-	-	-	X	X	40
Tree nuts, whole/processed	13	11	5	3	2	-	-	X	X	X	60
Sugar and tropical products	9	8	6	3	1	-	-	-	X	X	40
Major bulk products	16	10	6	3	3	-	-	-	X	X	40
Total agricultural exports	16	11	8	5	2	-	-	-	X	X	40
Average error and accuracy	18	14	9	6	3	X	X	X	X	X	34
Export volume											
Wheat	13	10	9	7	5	-	-	-	-	X	20
Rice	7	8	6	2	2	-	-	-	X	X	40
Coarse grains	8	4	7	4	2	-	X	-	X	X	60
Corn	7	4	7	4	2	-	X	-	X	X	60
Feeds and fodders	12	20	9	7	7	-	-	-	-	-	0
Soybeans	8	9	6	5	2	-	-	-	X	X	40
Soybean meal	15	10	8	7	4	-	-	-	-	X	20
Soybean oil	39	33	24	7	10	-	-	-	-	-	0
Beef and veal	17	25	14	6	0	-	-	X	X	X	60
Pork	18	9	13	6	4	-	-	-	-	X	20
Beef and pork variety meats	23	10	5	5	0	-	-	X	X	X	20
Broiler meat	8	9	6	7	4	-	-	-	-	X	60
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	15	12	7	2	2	-	-	-	X	X	40
Major bulk products	5	2	4	2	1	X	X	X	X	X	100
Average error and accuracy	13	11	8	4	3	12%	24%	24%	53%	82%	41%

[1] Forecast made for following fiscal year, with 15 months out. [2] Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.

Table 7--Reliability of quarterly U.S. export projections, by country and quarter

Country/region	Average forecast errors Fiscal 2006-08					Forecast accuracy Fiscal 2006-08					Forecast accuracy
	Aug [1]	Nov	Feb	May	Aug [2]	Aug [1]	Nov	Feb	May	Aug [2]	
Export value			*-- Percent --*					*"X" if error ≤ 5%*			*Percent*
Asia	20	13	10	6	1	-	-	-	-	X	25
East Asia	18	14	12	4	1	-	-	-	X	X	50
Japan	20	11	9	7	3	-	-	-	-	X	25
China	15	23	20	5	7	-	-	-	X	-	25
Hong Kong	20	13	11	3	3	-	-	-	X	X	50
Taiwan	17	8	5	7	3	-	-	X	-	X	50
South Korea	31	22	21	12	2	-	-	-	-	X	25
Southeast Asia	28	24	16	17	7	-	-	-	-	-	0
Indonesia	34	18	11	12	7	-	-	-	-	-	0
Philippines	31	23	11	3	5	-	-	-	X	X	50
Malaysia	8	0	6	6	0	-	X	-	-	X	50
Thailand	22	27	15	13	0	-	-	-	-	X	25
South Asia	33	22	20	15	14	-	-	-	-	-	0
Western Hemisphere	15	8	6	3	2	-	-	-	X	X	50
North America	11	6	4	2	1	-	-	X	X	X	75
Canada	11	5	3	2	1	-	X	X	X	X	100
Mexico	12	7	5	3	2	-	-	X	X	X	75
Caribbean	18	10	10	6	5	-	-	-	-	X	25
Central America	21	13	11	6	4	-	-	-	-	X	25
South America	35	20	19	13	9	-	-	-	-	-	0
Brazil	41	14	18	18	13	-	-	-	-	-	0
Colombia	23	12	10	6	7	-	-	-	-	-	0
Venezuela	47	35	24	9	15	-	-	-	-	-	0
Europe and Eurasia	22	11	6	6	4	-	-	-	-	X	25
European Union-27	22	10	8	8	4	-	-	-	-	X	25
Other Europe	60	29	22	24	18	-	-	-	-	-	0
FSU-12	35	27	18	10	12	-	-	-	-	-	0
Russia	26	17	8	15	12	-	-	-	-	-	0
Middle East	34	18	12	10	5	-	-	-	-	X	25
Turkey	23	17	15	14	12	-	-	-	-	-	0
Saudi Arabia	20	20	0	7	3	-	-	X	-	X	50
Africa	31	17	9	9	3	-	-	-	-	X	25
North Africa	36	20	13	16	9	-	-	-	-	-	0
Egypt	30	21	15	12	5	-	-	-	-	X	25
Sub-Sahara	18	11	2	8	10	-	-	X	-	-	25
Oceania	20	16	16	7	4	-	-	-	-	X	25
Transshipments via Canada	50	56	56	22	33	-	-	-	-	-	0
Average error and accuracy	26	17	13	9	7	0%	5%	16%	22%	59%	26%

[1] Forecast made for following fiscal year, with 15 months out. [2] Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.

Table 8--Reliability of quarterly U.S. import projections, by commodity and quarter

	Average forecast errors Fiscal 2006-08					Forecast accuracy Fiscal 2006-08					Forecast
Commodity	Aug [1]	Nov	Feb	May	Aug [2]	Aug [1]	Nov	Feb	May	Aug [2]	accuracy
	-- Percent --					*"X" if error ≤ 5%*					*Percent*
Import value											
Livestock, dairy, and poultry	7	5	6	6	2	-	X	-	-	X	40
Livestock and red meats	8	7	8	7	2	-	-	-	-	X	20
Cattle and calves	22	15	18	10	4	-	-	-	-	X	20
Swine	13	11	12	8	2	-	-	-	-	X	20
Beef and veal	11	14	9	8	3	-	-	-	-	X	20
Pork	8	6	6	6	0	-	-	-	-	X	20
Dairy products	8	8	6	5	1	-	-	-	X	X	40
Grains and feed	8	7	4	2	1	-	-	X	X	X	60
Grain products	4	4	3	2	0	X	X	X	X	X	100
Oilseeds and products	19	18	9	6	3	-	-	-	-	X	20
Vegetable oils	19	15	9	8	6	-	-	-	-	-	0
Horticulture products	6	5	3	2	1	-	X	X	X	X	80
Fruits--fresh	12	9	7	5	1	-	-	-	X	X	40
Fruits--processed	4	3	3	1	0	X	X	X	X	X	100
Fruit juices	18	9	7	6	1	-	-	-	-	X	20
Nuts--whole and processed	23	19	13	3	4	-	-	-	X	X	40
Vegetables--fresh	3	2	3	1	1	X	X	X	X	X	100
Vegetables--processed	2	2	2	1	0	X	X	X	X	X	100
Wine	3	2	2	2	3	X	X	X	X	X	100
Malt beer	6	5	2	3	2	-	X	X	X	X	80
Essence oils	6	6	5	4	3	-	-	X	X	X	60
Cut flowers & nursery stock	7	4	6	2	0	-	X	-	X	X	60
Sugar and tropical products	7	9	8	5	2	-	-	-	X	X	40
Cane and beet sugar	6	8	7	6	1	-	-	-	-	X	20
Confections	53	51	30	5	6	-	-	-	X	-	20
Cocoa and chocolate	16	15	12	3	3	-	-	-	X	X	40
Coffee beans and products	7	8	9	5	4	-	-	-	X	X	40
Rubber--natural	16	15	15	9	5	-	-	-	-	X	20
Other imports	6	2	6	8	0	-	X	-	-	X	40
Total agricultural imports	6	6	3	1	1	-	-	X	X	X	60
Average error and accuracy	11	9	8	5	3	X	X	X	X	X	46
Import volume											
Wine (HL)	25	25	13	13	0	-	-	-	-	X	20
Malt beer (HL)	9	4	2	1	0	-	X	X	X	X	80
Cattle and calves	19	0	0	0	4	-	X	X	X	X	80
Swine	6	4	9	9	1	-	X	-	-	X	40
Beef and veal	21	22	15	13	1	-	-	-	-	X	20
Pork	0	0	0	0	0	X	X	X	X	X	100
Fruits--processed	6	6	5	6	2	-	-	X	-	X	40
Vegetables--fresh	0	0	4	2	2	X	X	X	X	X	100
Vegetables--processed	4	5	1	4	0	X	X	X	X	X	100
Vegetable oils	15	15	6	0	0	-	-	-	X	X	40
Cocoa and chocolate	27	27	9	0	0	-	-	-	X	X	40
Coffee beans	11	8	14	6	9	-	-	-	-	-	0
Rubber--natural	8	5	3	3	6	-	X	X	X	-	60
Average error and accuracy	11	9	6	5	2	25%	50%	44%	56%	81%	55%

[1] Forecast made for following fiscal year, with 15 months out. [2] Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.

Table 9--Reliability of quarterly U.S. import projections, by country and quarter

Country/region	Average forecast errors Fiscal 2006-08					Forecast accuracy Fiscal 2006-08					Forecast accuracy
	Aug [1]	Nov	Feb	May	Aug [2]	Aug [1]	Nov	Feb	May	Aug [2]	
Import value	-- *Percent* --					*"X" if error ≤ 5%*					*Percent*
Western Hemisphere	7	6	5	1	0	-	-	X	X	X	75
Canada	8	6	5	2	1	-	-	X	X	X	75
Mexico	5	5	3	2	2	X	X	X	X	X	100
Central America	3	4	4	4	1	X	X	X	X	X	100
Costa Rica	8	5	5	3	0	-	X	X	X	X	100
Guatemala	12	19	13	8	5	-	-	-	-	X	25
Other Central America	9	7	7	4	0	-	-	-	X	X	50
Caribbean	31	12	12	8	8	-	-	-	-	-	0
South America	13	1	11	8	0	-	X	-	-	X	50
Brazil	2	2	3	5	3	X	X	X	X	X	100
Chile	8	6	6	5	2	-	-	-	X	X	50
Colombia	0	2	5	4	4	X	X	X	X	X	100
Other South America	7	7	8	2	2	-	-	-	X	X	50
Europe and Eurasia	0	2	0	1	1	X	X	X	X	X	100
European Union-27	2	2	1	2	1	X	X	X	X	X	100
Other Europe	8	6	6	6	1	-	-	-	-	X	25
Asia	13	11	7	4	1	-	-	-	X	X	50
East Asia	3	5	2	3	2	X	X	X	X	X	100
China	7	5	4	1	1	-	X	X	X	X	100
Other East Asia	9	8	2	4	4	-	-	X	X	X	75
Southeast Asia	9	5	7	2	0	-	X	-	X	X	75
Indonesia	10	9	7	3	3	-	-	-	X	X	50
Thailand	16	14	12	7	4	-	-	-	-	X	25
Other Southeast Asia	18	16	10	4	3	-	-	-	X	X	50
South Asia	13	10	9	2	0	-	-	-	X	X	50
India	10	7	9	5	3	-	-	-	X	X	50
Oceania	2	2	5	3	1	X	X	X	X	X	100
Australia	7	6	9	6	2	-	-	-	-	X	25
New Zealand	3	4	3	7	3	X	X	X	-	X	75
Africa	3	4	12	8	8	X	X	-	-	-	25
Sub-Sahara	4	2	14	7	10	X	X	-	-	-	25
Ivory Coast	8	0	14	6	8	-	X	-	-	-	25
Middle East	6	11	24	13	13	-	-	-	-	-	0
Turkey	16	7	7	0	5	-	-	-	X	X	50
Average error and accuracy	8	6	7	4	3	32%	47%	41%	68%	85%	60%

[1] Forecast made for following fiscal year, with 15 months out. [2] Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.

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Horticultural & Tropical Products:
Fruits & Preparations
Deciduous Fresh Fruit: Shari Kosco/FAS, 720-2083
Fresh Citrus and Juices: Reed Blauer/FAS, 720-0898
Vegetables & Preparations: Shari Kosco/FAS, 720-2083
Tree Nuts: Lashonda McLeod/FAS, 720-6086
Essential Oils: Tony Halstead/FAS, 720-1592
Sugar and Tropical Products: Bob Knapp/FAS, 720-4620
Sugar: Ron Lord/FAS, 720-6939

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Foreign Agricultural Service homepage: http://www.fas.usda.gov/
Economic Research Service homepage: http://www.ers.usda.gov/

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